

Training Guide for Using City of Seattle Content Management System (CMS) – Moderator

Version 1

Moderators are provided with expanded privileges within the CMS. Moderators have the power to:

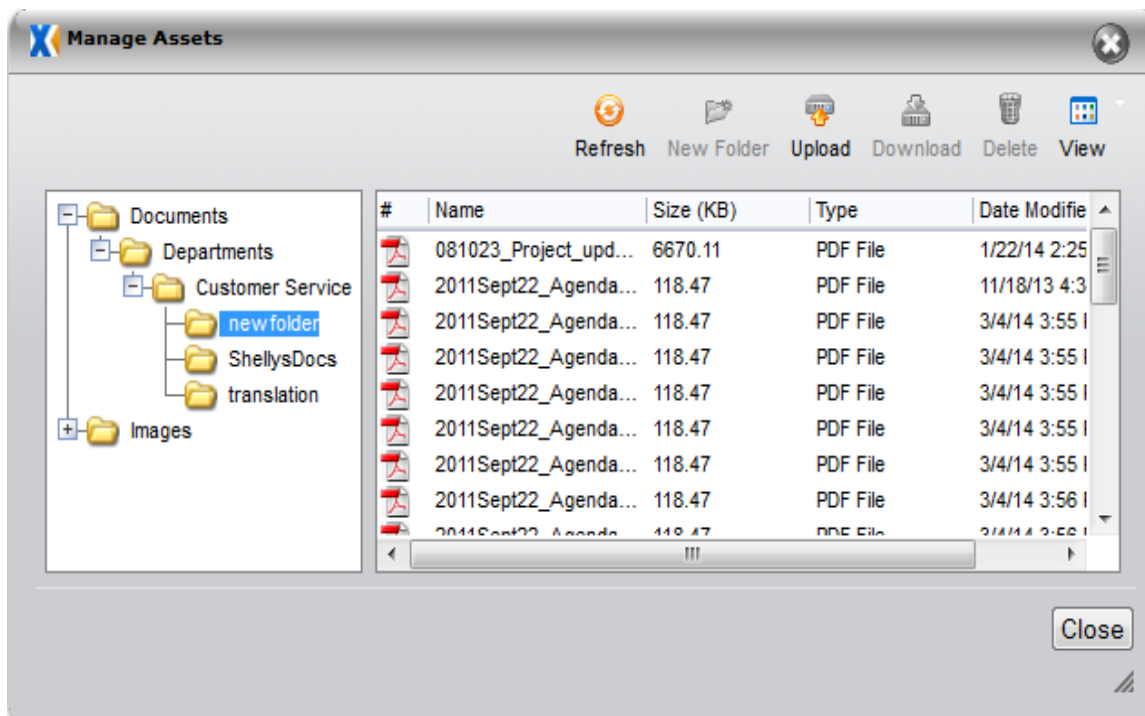
- Create folders sub-folders within Asset Management
- Create new pages
- Create new components
- Advanced Workflow options
 - Self-Publish to QA
 - “Claw” pages or components away from Contributors

Asset Management


Moderators have the power to create new sub-directories within their department’s Documents and Images directories.

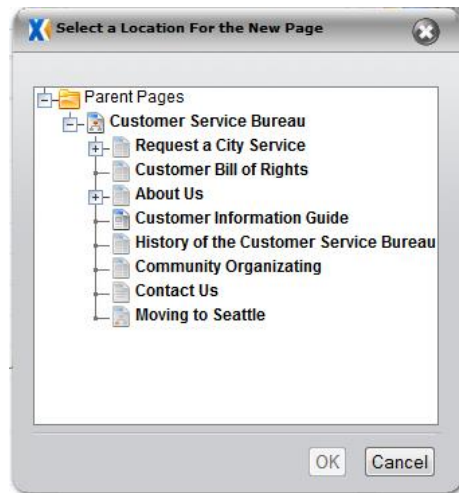
Moderators can also delete folders. Be VERY careful if you are deleting, accidentally deleted files and folder usually can **NOT** be recovered.

NOTE: when creating new sub-directories, their names must contain NO spaces and NO special characters! Hyphens and underscores are acceptable, as is camelBackNamingConvention.



Creating Pages

- **Creating a New Page on the Dashboard tab**
 - Choose **Dashboard** on the Toolbar
 - In the **Create Content** box, choose one of the **Wizards for Creating New Content**. [Select a Page Creation Rule Wizard?](#)
 - A text box appears. Enter the name of the new page.
 - Choose  or press Return.
 - A **Select a Location for the New Page** dialog box appears:



- Select your Department's home page if you want the new page to be at this level in your site tree, or select the sub-page you want the new page to be under.
- Choose OK.
- The new page will appear in your site tree, and you will see the Edit Form for the new page in your Edit Pane.

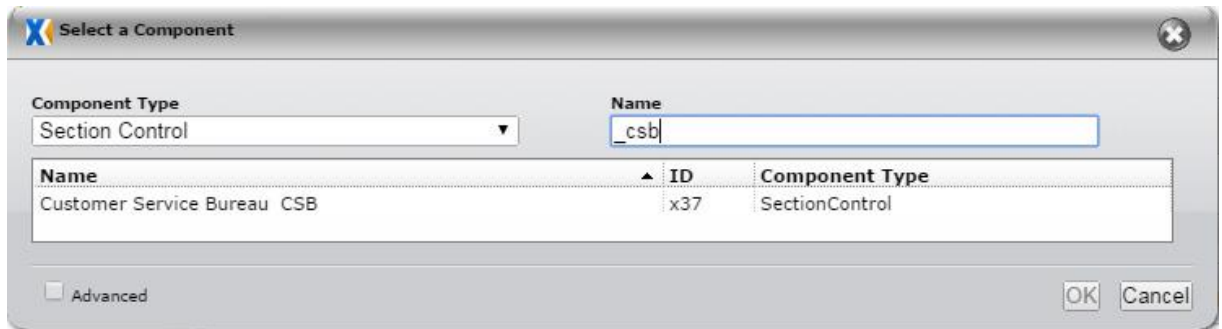
- **Completing Page Elements**

Required elements must have a value before the page can be saved or Advanced in Workflow. Required elements are labeled on the Edit Form and include Title, Excerpt, Breadcrumbs (leave set to default), and Section Control.

The Section Control is the DNA of your Web Site. It contains important information regarding how your site will display. It determines what kind of navigation will be used, department contact info to display, and any universal components that should appear on all site pages. Some larger sites may have multiple Section Controls, but most sites will only use one.

To add a Section Control to a new page, find the Section Control field at the bottom of the page and click on Pick.

This will open the Select a Component window.



To find the correct component, use the Name field in the upper right to search. Search for the name of your department[BLS1].

Creating a new Component

Two things to consider when working with a component: what does it do, and where on the page will it live?

Some components have very limited editing and a very specific purpose. For instance, a Link List only allows you to enter URLs, Link Titles, and to specify what type of link. It produces a bulleted list of hyperlinks.


But an XHTML component acts like a mini version of a page's Body Copy editor. It allows you to add and format text, include hyperlinks and even images.

The primary locations for components are:

- Left Sidebar below navigation
- Right Sidebar
- Main Column below the page's Body Copy
- On Home pages, Main Column either above or below Body Copy

Any Component can be included on one, several, or all of your pages. However Sidebar components can only be included in the Right or Left Sidebars, and Main Column components can only be included in the Main Column.

To make a new Component,

- Go to the Dashboard
- Under "New," find the wizard title which best describes your desired Component – for instance, **Sidebar XHTML Copy** will allow you add custom text to the left or right column.
- When entering the Page Name for the component, remember to end it with a tail based your department name, such as "_CSB".
- Choose  or press Return.
- A **Select a Location for the New Page** dialog box appears. Select the folder that corresponds to the type of component you are creating.
- Choose OK.
- Once the new component is created, it must be added to the page or pages where it needs to reside. Choose from Left Sidebar, Main Column Bottom, and Right Sidebar, click on the Pick button, and use the Select a

Component window to find the new component. Click the component, and then click OK. The new sidebar can now be previewed in the Page using the Page View tab or Preview button in the toolbar.

It is also possible to drag the Component from the Site Tree and drop it on the Component field in the Edit Form view of the page.

If you have a component you would like to appear on all of your site pages, the best course of action is to contact the Web Team to add that component to your site's section control.

There are a wide variety of components available. A complete list can be found at <http://igxqa8.seattle.gov/demo-home/components>

Finishing a Page

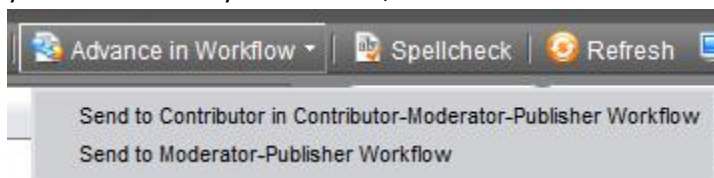
- **Spellcheck**
- **Previewing a Page**
- **Saving a Page**

A Page can be saved at any time. Saving changes does not cause the changes to appear on the published website.

Make edits, Save the Page, close the CMS and return to it later to finish the edits on the page. This saved draft version of the Page can be later finished and then advanced through Workflow.

- **Advance a new page or component in Workflow**

The *first time a new page is advanced in workflow it must be **assigned** to a workflow*. If your team has Contributors, you must choose "Send to Contributor in Contributor-Moderator-Publisher Workflow." If your team has only Moderators, choose "Send to Moderator-Publisher Workflow."



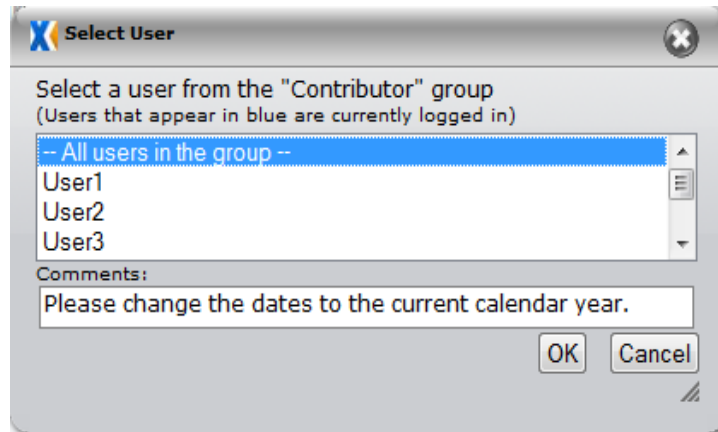
If your team only has moderators, and your page is ready to publish, you can advance it using the Moderator-Publisher Workflow AND assign it to yourself. You'll now see the assigned Workflow at the top of the page. And you can Advance the page a second time, either self-publishing to QA or submitting to the Publisher group to have the page published to Production.

- **Advance an existing Page or Component in Workflow**

Moderators hold the intermediate position in the CMS workflow, and have several options available, including the ability to reverse the "assembly line."

These options are:

- **Return to Contributor** – if additional edits are necessary, this step can be used to send a page back to the Contributor group. It is always a good idea to include a comment indicating the necessary edits.



- **Send to Publisher** – If a page is ready to appear on the production version of your site where it can be viewed by the public, choose Send to Publisher, and choose All Users in the Publisher group. A member of the Publisher group will publish the page, and you will be notified via email.
- **Publish to QA** – Moderators have the power to publish Pages and Components to the “Quality Assurance” development server, where they can be reviewed by City staff that may not have access to the Content Management System.

The address of a page can be found by adding the xID value for a page, plus “.xml” at the end of the QA server address - **<http://igxqa8.seattle.gov/x5555.xml>**

This preview version of the Page will appear just as it would on the production version of the site.

Taking Possession of a Page or Component – “Clawing”

If a page or component is assigned to the Contributor group, or even to a specific Contributor, a Moderator has the power to steal the page or component from the Contributor.

We call this Clawing the page or component away from the Contributor. We call it that ‘cuz it sounds cool. Also, because Clawing is dangerous.

If the Contributor is in the process of making edits, any unsaved changes **may be lost when the page or component is Clawed away**. *Use this power wisely.*

To claw a page from a Contributor, select the page, from Advance in Workflow choose Send to Moderator, and assign to yourself.

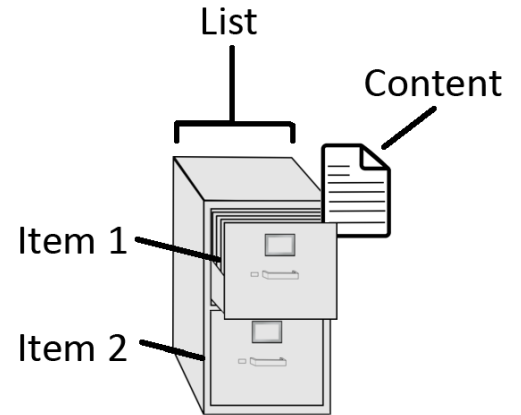
Appendix 1

"Filing Cabinet" Component Structure

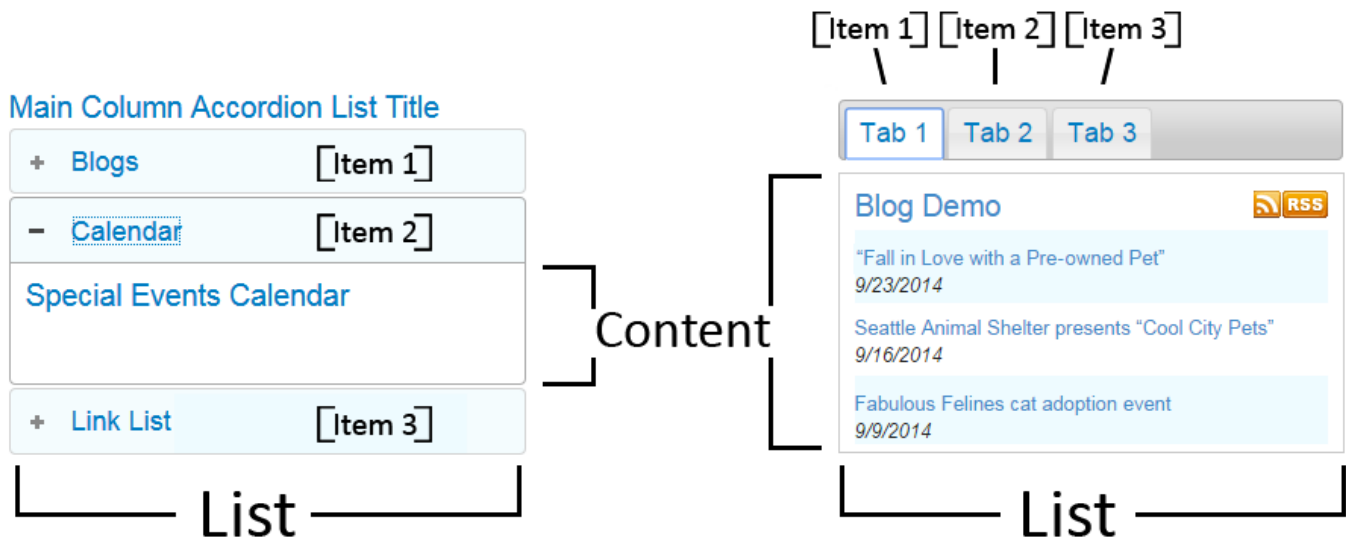
Some components rely on subordinate components in order to work properly. Their structure is similar to a filing cabinet.

The Accordion and Tab components display differently on the page, but share the same behind-the-scenes structure.

- The List component serves as the container
- Several Item components are nested within the List
- The content within an Item is most commonly stored within an XHTML component. Each item can actually support several content components.



The image below illustrates how the List, Items, and related content might display on a page within an Accordion and a Tab.



If you need an accordion or tab added to your web site, contact the CityWeb Team and we can assist in creating the List and Item(s) you will need. You can create the components that store the content, and CWT will then place those content components within their corresponding Items in the List.